

Chapter 2

Arranging Training

Chapter Overview

Introduction This chapter guides you through the processes of arranging training, to include Activities, Events, and creating Local Suppliers.

**Chapter
Contents**

Topic	Page
Creating a Local Supplier for a Local Activity	3
Accessing the Suppliers Summary Window	4
Completing the Suppliers Window	6
Completing the Supplier Sites Window	9
Defining a Local Activity	12
Completing the Activities Window	14
Completing the Additional Activity Information	16
Entering a Local Activity Name	17
Scheduling an Event	21
Accessing Scheduled Event Window	23
Completing the Scheduled Event Window	24
Completing the Additional Event Information Window	29
Querying for an Event	31
Copying an Event	33
Changing the Event Status	34
Restricting an Event	37
Creating a One-Time Event	38
Using the Bulletin Board	40
Building and Booking Resources	43

Continued on next page

Chapter Overview, Continued

See Also



Module 1, Fundamentals of the Modern DCPDS

Chapter 7, Folders

Module 7, Employee Training and Development Using the Modern DCPDS

Chapter 1, Requesting Training

Section: Completing the Training Request Form

Chapter 4, Training Completions and Evaluation

Section: Managing Completions and Evaluations

Chapter 7, Setting up Local Codes

Creating a Local Supplier for a Local Activity

Purpose	This procedure will guide you through the steps for creating a local supplier (vendor) for a local Activity.
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Before You Begin	You must create a local supplier before you can set up a local Activity (course), if the supplier is not in the DoD Course Catalog.
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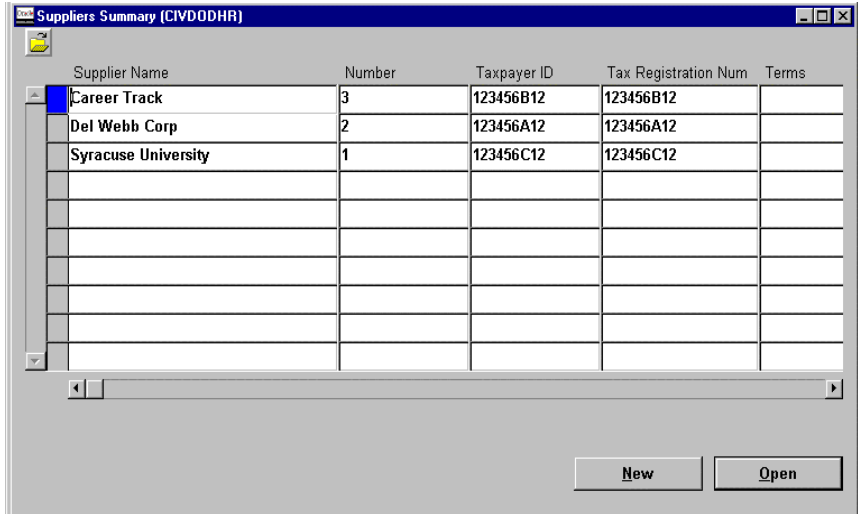
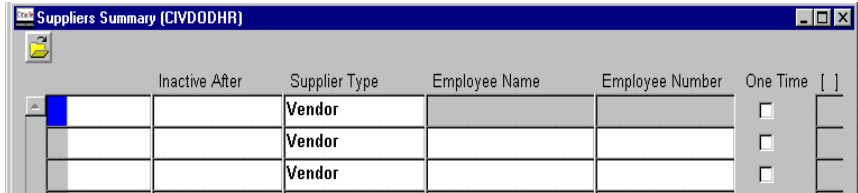
Who Does This	Components will determine who has the responsibility.
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Creating a Local Supplier for a Local Activity, Continued


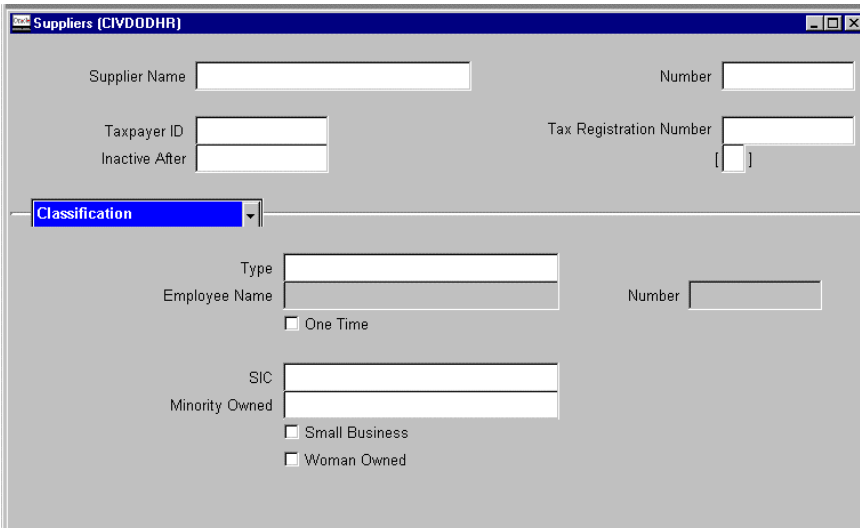
Accessing the Suppliers Summary Window

Step	Action
1	On the Navigation List → <i>Organizations</i> → <i>Supplier</i> → <Open> .
2	<p>The Suppliers Summary Window displays with nine columns, a One Time checkbox, an inactive DDF, and two Taskflow buttons. If you have built Local Suppliers, query the existing list by clicking Query and clicking Run or pressing [F8]. If you have not built local Suppliers, the window will be blank.</p>  <p>Use the bottom scroll bar to review remaining columns and checkbox.</p> 

Continued on next page

Creating a Local Supplier for a Local Activity, Continued


Accessing the Suppliers Summary Window (continued)

Step	Action		
3	<p>If the Supplier you need...</p> <table border="1"> <tr> <td> <p>Is listed, click <Open>.</p> <ul style="list-style-type: none"> The Suppliers Window opens with the name of the Supplier populating in the Supplier name field. Review information to ensure accuracy. If ok, Exit the window and move to the next process, Defining an Activity. </td><td> <p>Is not listed, click <New>.</p> <ul style="list-style-type: none"> The cursor drops down to the next empty line. Type the name of the new supplier (up to 80 characters). Do not type in the remaining columns. Click <Open>. </td></tr> </table> <p> Note: If you have no local Suppliers built, click <Open>.</p>	<p>Is listed, click <Open>.</p> <ul style="list-style-type: none"> The Suppliers Window opens with the name of the Supplier populating in the Supplier name field. Review information to ensure accuracy. If ok, Exit the window and move to the next process, Defining an Activity. 	<p>Is not listed, click <New>.</p> <ul style="list-style-type: none"> The cursor drops down to the next empty line. Type the name of the new supplier (up to 80 characters). Do not type in the remaining columns. Click <Open>.
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4	<p>The Suppliers Window displays. The window has a Supplier Name Region, a drop-down Classification menu with 12 choices (only Classification and Sites are used by DoD), a Type data field, and two checkboxes. Complete the data fields as indicated.</p> 		

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Creating a Local Supplier for a Local Activity, Continued

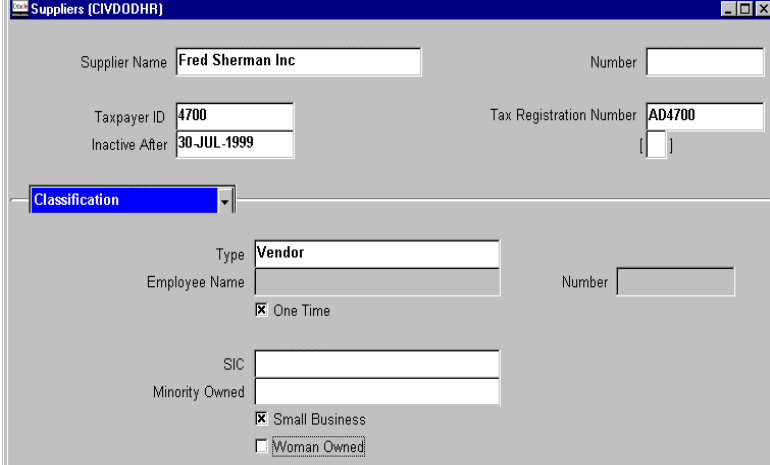
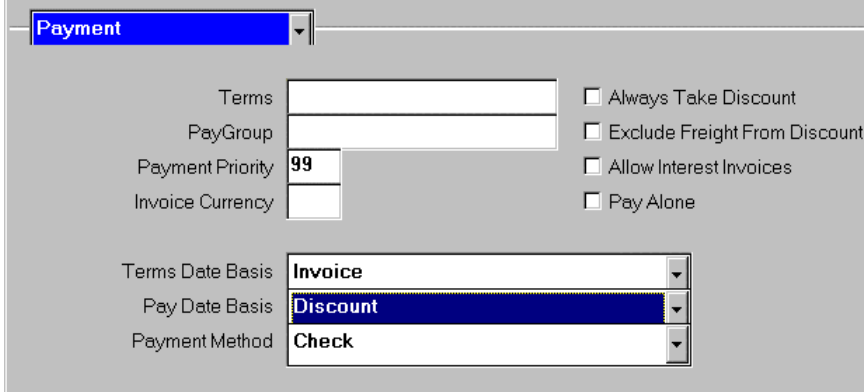
Completing the Suppliers Window

Step	Action																														
1	Place the cursor in the Supplier Name data field to enter the following data:																														
	<table> <tr> <th>Data Field</th><th>Action</th></tr> <tr> <td>Supplier Name</td><td>Type in the name up to 80 characters (mixed case).</td></tr> <tr> <td>Taxpayer ID</td><td>Type in number (optional).</td></tr> <tr> <td>Inactive After</td><td>Leave blank if planning to use again or type in date if not.</td></tr> <tr> <td>Number</td><td>System generated.</td></tr> <tr> <td>Tax Registration Number</td><td>Type in number (optional).</td></tr> <tr> <td>[]</td><td>Not customized for DoD.</td></tr> <tr> <td>Type</td><td>Click the LOV and select vendor.</td></tr> <tr> <td>Employee Name</td><td>Not active (optional).</td></tr> <tr> <td>Number</td><td>Not active (optional).</td></tr> <tr> <td>One-Time Checkbox</td><td>Click checkbox if the supplier is being used one time (optional).</td></tr> <tr> <td>SIC</td><td>Standard Industry Code (optional).</td></tr> <tr> <td>Minority Owned</td><td>Self-explanatory (optional).</td></tr> <tr> <td>Small Business Checkbox</td><td>Click checkbox (optional)</td></tr> <tr> <td>Woman Owned Checkbox</td><td>Click checkbox (optional)</td></tr> </table>	Data Field	Action	Supplier Name	Type in the name up to 80 characters (mixed case).	Taxpayer ID	Type in number (optional).	Inactive After	Leave blank if planning to use again or type in date if not.	Number	System generated.	Tax Registration Number	Type in number (optional).	[]	Not customized for DoD.	Type	Click the LOV and select vendor.	Employee Name	Not active (optional).	Number	Not active (optional).	One-Time Checkbox	Click checkbox if the supplier is being used one time (optional).	SIC	Standard Industry Code (optional).	Minority Owned	Self-explanatory (optional).	Small Business Checkbox	Click checkbox (optional)	Woman Owned Checkbox	Click checkbox (optional)
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Woman Owned Checkbox	Click checkbox (optional)																														
 Note: If your Component does not require the optional fields, leave blank.																															

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Creating a Local Supplier for a Local Activity, Continued

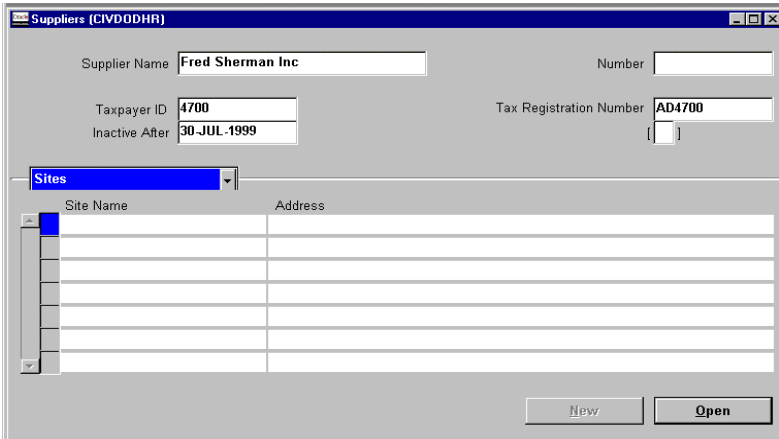

Completing the Suppliers Window (continued)

Step	Action
1 (cont)	<p>◆ Example of a completed Suppliers Window before using the Classification drop-down menu to complete the Payment and Sites Region.</p> 
2	Click the Classification drop-down menu and select <i>Payment</i> .
3	<p>The lower half of the Suppliers Window displays the drop-down menu <i>Payment</i>, with seven data fields and four checkboxes. The first four data fields (Terms, PayGroup, Payment Priority, and Invoice Currency) are optional. The Terms Date Basis data field is a required Oracle field and must be entered. Once you click the drop-down menu to make a selection (e.g., <i>Invoice</i>). Pay Date Basis and Payment Method data fields auto-populate. Select <i>Sites</i> from the drop down menu.</p> 

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Creating a Local Supplier for a Local Activity, Continued

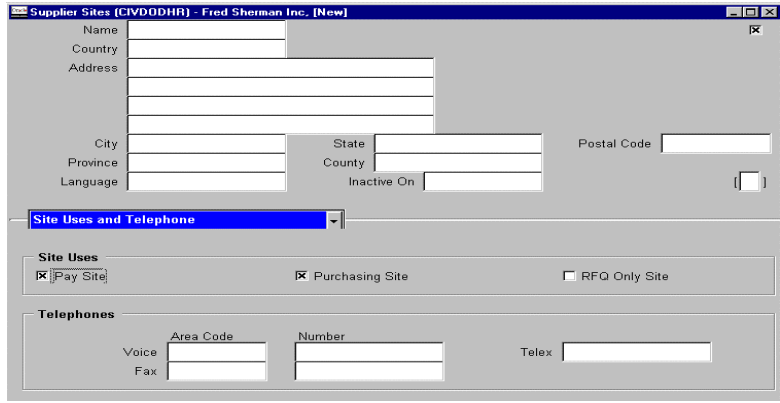
Completing the Suppliers Window (continued)

Step	Action
4	<p>Once you complete the Payment Region, the lower half of the Suppliers Window displays with a new Site Name and Address data fields. The <New> Taskflow Button is inactive at this time. The top region is populated from the previous window.</p> 
5	<p>Click <Open>. The Supplier Sites Window displays.</p> <p> Note: You may list several different sites for a supplier (e.g., Northwest Region, Southeastern Region). However, the DD Form 1556 will only pick up the first site address. It is recommended that separate suppliers be set up for each address; e.g., Oracle Northwest Region, separate supplier as Oracle Southeastern Region, etc.</p>

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Creating a Local Supplier for a Local Activity, Continued


Completing the Supplier Sites Window

Step	Action																		
1	<p>The Supplier Sites Window displays with the vendor name on the Titlebar and the drop down menu displays <i>Site Uses and Telephone</i>. Place your cursor in the Name data field to enter the following:</p> 																		
	<table border="1"> <thead> <tr> <th>Data Field/Region</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>Name</td><td>Type in name of the site (location where training is to be conducted) (15-character limit).</td></tr> <tr> <td>Country</td><td>Click the LOV or type in.</td></tr> <tr> <td>Address</td><td>Type in street address of vendor.</td></tr> <tr> <td>State</td><td>Type in state address of vendor.</td></tr> <tr> <td>Postal Code</td><td>Type in zip code of vendor address.</td></tr> <tr> <td>Language</td><td>Click in field – populates with the default to American English (language in which the course is taught).</td></tr> <tr> <td>Inactive On</td><td>Type in date the vendor becomes inactive, if appropriate.</td></tr> <tr> <td>Global DDF</td><td>Flexfield is not customized for DoD.</td></tr> </tbody> </table>	Data Field/Region	Description/Action	Name	Type in name of the site (location where training is to be conducted) (15-character limit).	Country	Click the LOV or type in.	Address	Type in street address of vendor.	State	Type in state address of vendor.	Postal Code	Type in zip code of vendor address.	Language	Click in field – populates with the default to American English (language in which the course is taught).	Inactive On	Type in date the vendor becomes inactive, if appropriate.	Global DDF	Flexfield is not customized for DoD.
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Creating a Local Supplier for a Local Activity, Continued

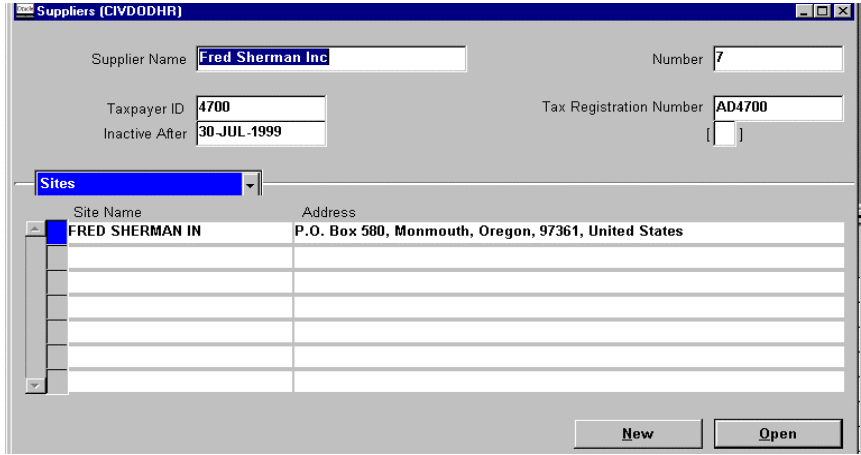
Completing the Supplier Sites Window (continued)

Step	Action	
1(cont)	Data Field	Action
	Site Uses Region	Checkboxes not required.
	Telephones Region	Type in Voice or Fax information to include area code.
2	<p>Click Save on the Toolbar. Exit the window.</p> <p>◆ Example:</p> <div><div>Supplier Sites (CIVD00DHR) - Fred Sherman Inc. [New]</div><div><div><div>Name</div><div>FRED SHERMAN IN</div></div><div><div>Country</div><div>United States</div></div><div><div>Address</div><div>P.O. Box 580</div></div><div><div>City</div><div>Monmouth</div></div><div><div>State</div><div>Oregon</div></div><div><div>Postal Code</div><div>97361</div></div><div><div>Province</div><div></div></div><div><div>County</div><div></div></div><div><div>Language</div><div>American English</div></div><div><div>Inactive On</div><div></div></div></div><div><div>Site Uses and Telephone</div><div><div>Site Uses</div><div><div><input checked="" type="checkbox"/> Pay Site</div><div><input checked="" type="checkbox"/> Purchasing Site</div><div><input type="checkbox"/> RFQ Only Site</div></div><div><div>Telephones</div><div><div><div>Voice</div><div><div>Area Code</div><div>503</div></div><div><div>Number</div><div>623-3535</div></div></div><div><div>Fax</div><div><div>Area Code</div><div>503</div></div><div><div>Number</div><div>623-4009</div></div></div><div><div>Telex</div><div></div></div></div></div></div></div><p> Note: You can enter the vendor’s email address at the beginning of the address data field. It will then display first in the address string of information.</p></div>	

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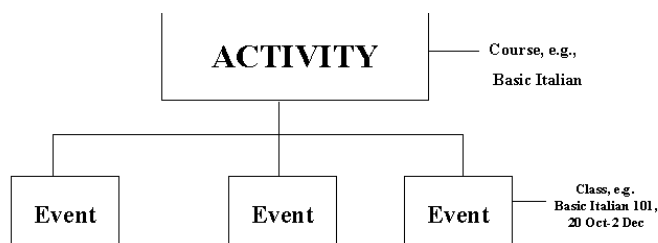
Creating a Local Supplier for a Local Activity, Continued

Completing the Supplier Sites Window (continued)

Step	Action
3	<p>The Suppliers Window displays. The lower portion is populated with the vendor information.</p> 
4	Click <New> or <Open> to create/display another local vendor.

Defining a Local Activity

Purpose	This section guides you through the steps to set up a local Activity (course) which is usually the first action taken after a Training Request Form is completed or received, and before an employee can be enrolled in training. You must set up a local Activity if it is not in the DoD Course Catalog.
Definitions	<p>Activity - defines the courses listed in the DoD Central Course Catalog as well as what a local supplier (vendor) can offer. Local courses can be built for Local Activities. An Activity can be any of the following:</p> <ul style="list-style-type: none"> • A training course conducted internally or bought from an external supplier, regardless of method; e.g., classroom, CBI, correspondence, seminar. • On-the-job training and apprenticeships. • Work experience and cross-training. • Educational Activity (college/university courses). <p>Activity Type – one of the nine OPM training course code types expanded to include functional areas within DoD; e.g., Acquisition, as described in this Module overview.</p>



See Also



In this Module:

- Overview
 - Section: Course Training Type Codes
- Chapter 1, Requesting Training
 - Section: Completing the Training Request Form
- Chapter 3, Managing Enrollments, Cancellations, and Attendance
 - Section: Enrolling an Employee
- In this Chapter:
 - Building and Booking Resources

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Defining a Local Activity, Continued

Who Does

This



Components will determine who will be given this responsibility.

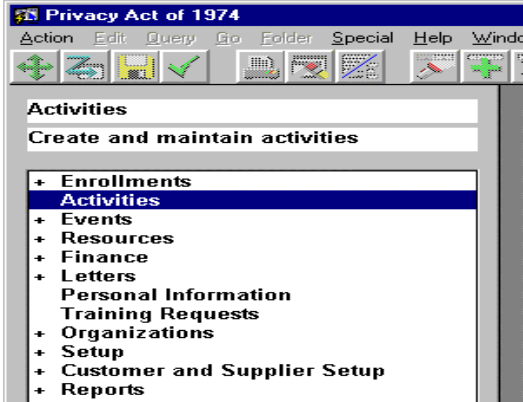
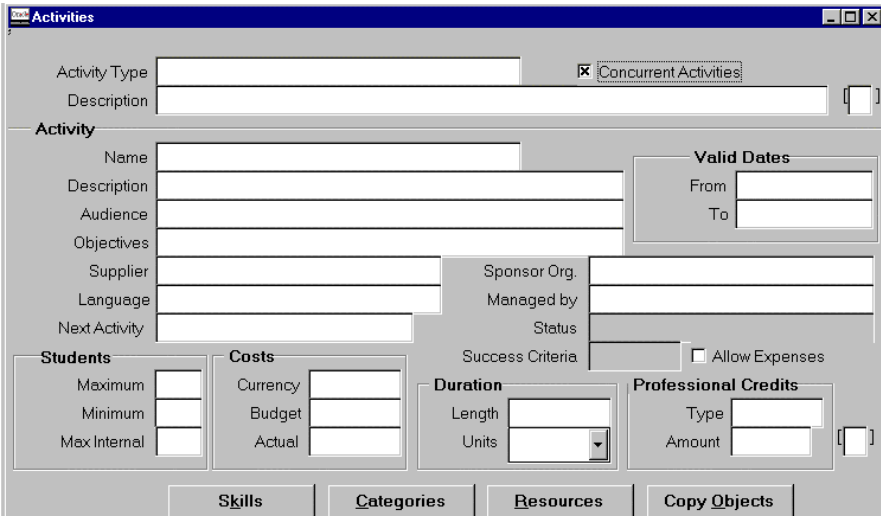
Before You Begin

- You must accomplish these actions in the following sequence before an employee can be nominated or scheduled for training:
 - Build a Local Supplier, if needed.
 - Define an Activity, if needed.
 - Schedule an Event.
 - Schedule sessions, if more than one (not required).
 - Enroll an employee.
- Once an Activity is defined, it does not have to be rebuilt for each subsequent event. **As long as the Activity is not end dated**, you can skip directly to Scheduling an Event. If the Activity already exists, you will receive a message.
- You must identify a new supplier (if not in the DoD Course Catalog) before an Activity (course) can be built.
- You can have multiple Activities of the same type with different validity dates. If you want to run concurrent versions of an Activity, use dates to control when the Activity can be scheduled.
- You cannot run Events for the Activity earlier than the start date or later than the end date.
- If you build a Local Activity and don't remember what Activity Type it is, use the Course Title LOV on the Training Request Form to access it.

Continued on next page

Defining a Local Activity, Continued



Completing the Activities Window

Step	Action
1	<p>On the Navigation List → <i>Activities</i> → <Open>.</p> 
2	<p>The Activities Window displays. With your cursor in the Activity Type data field, click F8 on your keyboard to bring up first type or run a query for a specific type you need; e.g., press F7, type 5%, press F8. If there is more than one entry for that query; e.g., 5D, 5N, use the arrow down key to move to the next activity.</p> 

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Defining a Local Activity, Continued

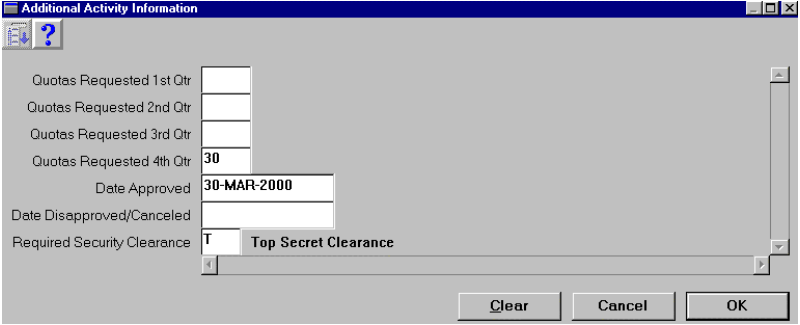
Completing the Activities Window (continued)

Step	Action
3 	<p>The Activity Type and Description display the nine expanded OPM Training Course Code Types and expanded functional codes for a total of 21 selection codes. These codes should not be altered.</p> <p>Caution: Use the [Tab] key to proceed to each data field; the up/down keys will move you to a new Activity Window. If you inadvertently use the arrow keys and a new Activity Window displays, click Go on the Toolbar and select Previous Record to return to your working window.</p>
4	Select the Concurrent Activities Checkbox to set up multiple activities of the same type with different validity dates. For example, you may have an activity that is delivered as both a day course and as an evening course.
5 	<p>Click the DDF to open the Additional Activity Information Window.</p> <p>Note: All data fields are currently optional.</p>

Continued on next page

Defining an Activity, Continued


Completing the Additional Activity Information

Step	Action																
1	With your cursor in the first data field, complete the following:																
	<table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td>Quotas Requested 1st Qtr</td><td>Type in number (optional field).</td></tr> <tr> <td>Quotas Requested 2nd Qtr</td><td>Type in number (optional field).</td></tr> <tr> <td>Quotas Requested 3rd Qtr</td><td>Type in number (optional field).</td></tr> <tr> <td>Quotas Requested 4th Qtr</td><td>Type in number (optional field).</td></tr> <tr> <td>Date Approved</td><td>Type in date (optional field).</td></tr> <tr> <td>Date Disapproved/ Canceled</td><td>Type in date, if disapproved (optional field).</td></tr> <tr> <td>Required Security Clearance</td><td>Defaults to N (No Clearance) to make a selection for the Security Clearance for the Activity (optional field).</td></tr> </table>	Data Field	Description/Action	Quotas Requested 1 st Qtr	Type in number (optional field).	Quotas Requested 2 nd Qtr	Type in number (optional field).	Quotas Requested 3 rd Qtr	Type in number (optional field).	Quotas Requested 4 th Qtr	Type in number (optional field).	Date Approved	Type in date (optional field).	Date Disapproved/ Canceled	Type in date, if disapproved (optional field).	Required Security Clearance	Defaults to N (No Clearance) to make a selection for the Security Clearance for the Activity (optional field).
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2	<p>Click <OK> on the Additional Activity Information Window once you have completed the data fields.</p> <p>◆ Example:</p> 																
3	The populated Activities Window displays. Click Save on the Toolbar.																

Continued on next page

Defining a Local Activity, Continued


Entering a Local Activity Name

Step	Action																				
1	With your cursor in the Name data field, scroll through the Activity (Course) Names using the Page Down or Page Up keys to locate the one that matches the TRF from your Civilian Inbox or which you plan to define. If you do not find a match to the Activity you wish to locate, you may begin to define an Activity.																				
2	To enter a new activity name (local course), select the activity type (e.g., Orientation, Acquisition, Executive) that most closely relates to the new course. With your cursor in the activity name field, select the New Record Button  on the Toolbar. This will clear the last record and allow you to input information for the new Activity name and remaining fields in the Activity Region:																				
	<table> <tr> <th>Fields, Buttons, and Checkboxes</th><th>Description/Action</th></tr> <tr> <td>Activity Region:</td><td></td></tr> <tr> <td>Name</td><td>Type in the name of the new activity up to 2000 characters (mixed case).</td></tr> <tr> <td>Description</td><td>Type in up to 2000 characters.</td></tr> <tr> <td>Audience</td><td>Type in up to 2000 characters.</td></tr> <tr> <td>Objectives</td><td>Type in up to 2000 characters.</td></tr> <tr> <td>Supplier</td><td>Click the LOV. See procedures in this chapter to Build a Local Supplier.</td></tr> <tr> <td>Language</td><td>Defaults to American English.</td></tr> <tr> <td>Next Activity</td><td>Used to identify the successor activity after the current activity has been end dated. (Optional)</td></tr> <tr> <td>Sponsor Org.</td><td>Populates with your organization but you can override by clicking the LOV and selecting another UIC or PAS code.</td></tr> </table>	Fields, Buttons, and Checkboxes	Description/Action	Activity Region:		Name	Type in the name of the new activity up to 2000 characters (mixed case).	Description	Type in up to 2000 characters.	Audience	Type in up to 2000 characters.	Objectives	Type in up to 2000 characters.	Supplier	Click the LOV. See procedures in this chapter to Build a Local Supplier.	Language	Defaults to American English.	Next Activity	Used to identify the successor activity after the current activity has been end dated. (Optional)	Sponsor Org.	Populates with your organization but you can override by clicking the LOV and selecting another UIC or PAS code.
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Defining a Local Activity, Continued

Entering a Local Activity Name (continued)

Step 3 (cont)	Action	
	Fields, Buttons, and Checkboxes	Description/Action
	Activity Region:	
	Managed by	Type in the manager's name or registrar responsible. (optional)
	Status	Grayed out.
	Success Criteria	Grayed out.
	Allow Expenses Checkboxes	Not customized for DoD use.
	Valid Dates Region	Automatically displays the start (From) date when the activity is built. The (To) date is entered when the activity is ended.
		Note: End dating should be used sparingly as activities can be reused indefinitely.
	Students Region:	
	Maximum	Type in number of students. Populates when you complete the Scheduled Event Window . (optional)
	Minimum	Type in number of students.
	Max Internal	Type in number of students.
	Costs Region:	
	Currency	Defaults to USD.
	Budget	Type in total projected course cost (optional).
	Actual	Leave blank while building the Activity; input when known.

Continued on next page

Defining a Local Activity, Continued

Entering a Local Activity Name (continued)

Step	Action	
3 (cont)	Fields, Buttons, and Checkboxes	Description/Action
	Duration Region:	
	Length	Input number to match unit; e.g., 1 (week).
	Units	Select from drop down menu. Defaults to hours.
	Professional Credits Region	Add choices using Local Codes on the LOV.
	DDF	For Air Force use only (under development).
	Taskflow Buttons:	For local use:
	< <u>S</u> kills>	Will be used to enter information about the skills the activity is expected to provide; does not flow to CMIS. This information will be updated through the Look up Codes on the Navigation List .
	< <u>C</u> ategories>	Used locally to group activities into three types – program, classification, package (e.g., acquisition, VRA). This information will be updated through the Look up Codes on the Navigation List .
	< <u>R</u> esources>	Used to specify resources required or useful to run the event for the activity; e.g., classroom equipment, trainer, venue. This information will be updated through the Look up Codes on the Navigation List . See Building and Booking Resources in this chapter.

Continued on next page

Defining a Local Activity, Continued

Entering a Local Activity Name (continued)

Step	Action	
3 (cont)	Fields, Buttons, and Checkboxes	Description/Action
	<Copy <u>O</u> bjects>	Opens to show Copy From data field (with the activity auto-populated), New Activity data field, and four checkboxes (Categories, Resource Usages, Price List entries, Skills), and a <Copy> Taskflow Button.
4	Click Save on the Toolbar.	

Activity Window

◆ Example of a completed Activity Window:

The screenshot shows the 'Activities' window with the following fields and values:

- Activity Type:** 1-A EXECUTIVE
- Description:** 1-A EXECUTIVE
- Activity Name:** Adv Management Prog
- Description:** Refines skills, knowledge, and understanding essential to
- Audience:**
- Objectives:** Two years in the grade of colonel before class entry. Lor
- Supplier:** AIR UNIV CENTER FOR PROF DE
- Language:** American English
- Next Activity:**
- Sponsor Org.:** CIVDODHR
- Managed by:** Bailey, Patrick H.
- Status:**
- Success Criteria:**
- Valid Dates:** From 01-JAN-1950 To
- Students:** Maximum 60, Minimum 45, Max Internal 30
- Costs:** Currency USD, Budget 0.00, Actual 0.00
- Duration:** Length 40, Units Hour
- Professional Credits:** Type, Amount
- Buttons:** Skills, Categories, Resources, Copy Objects

Continued on next page

Scheduling an Event

Purpose This procedure will guide you through the steps to schedule an Event which is the third action taken after a **TRF** is completed or received in the **Civilian Inbox**, and before an employee can be enrolled in training.

Definitions **Event** - a specific instance of an Activity (course) scheduled to run on given dates, or a one-time **Event**, which is not related to an Activity. An Event can run any period of time you choose; e.g., several hours, days, or weeks.

Session - a unit of time within an **Event** for which you can independently book resources.

◆ **Example:** To help you create a detailed agenda for an **Event**, you can break it down into shorter sessions, specifying the location with start and end times of each session. You might divide a one-day Event into four two-hour sessions.

Who Does This Components will determine who has this responsibility. A standard naming convention for Event title may be needed.



See Also



In this Module:

Chapter 1, Requesting Training

Section: Completing the Training Request Form

Chapter 2, Arranging Training

Section: Defining an Activity

Section: Building and Booking Resources

Chapter 6, Reports

Chapter 7, Setting Up Local Codes

Continued on next page

Scheduling an Event, Continued

Before You Begin

- When you are ready to run an **Activity** (course), you create a scheduled **Event** for which you can book resources and enroll students.
 - An **Event** may run for any period of time you choose, that is several hours, days, or weeks.
 - There is no limit on the number of **Events** you can schedule for an Activity.
- If the Training Center location you need is not included, you can add it by following the instructions in Setting up Local Codes in Chapter 7.
- You can also:
 - Break down an **Event** into sessions. Sessions are discrete topics or time slots within an **Event**. You must enter the times using a 24-hour clock to include colons; e.g., 08:00.
 - Restrict an **Event** to internal employees or customers.
 - View or enter categories for the **Event**.
- ◆ **Example:** You may run the **Event** “*Using the Modern DCPDS*” over a two week period setting up a session for each day in the two weeks. The first session on Day 1 might be “*Introducing the Modern DCPDS*”; the second session on Day 2 might be “*Getting Started*,” through the 10th day of the Activity (course).
- You can book resources, such as venues (locations) and trainers, for the whole **Event** or for individual sessions.
- Using Quick Codes, you can add other choices to the Event Status.
- Other Navigator menu choices under Events besides Scheduled include:
 - Programs – not used by DoD, can be used to set up sequence type training for special programs such as intern training.
 - Development – not used by DoD.
 - One-Time Event – see procedures in this chapter.
 - Event Search – can use for search purposes or to build and book resources.

Continued on next page

Scheduling an Event, Continued

How To Access the Scheduled Event Window










On the **Navigation List** → *Events* → *Scheduled* → **<Open>**.

Taskflow Button	Description/Action
<Change Status>	To change the status of an Event by: <ul style="list-style-type: none"> • Closing or • Canceling or • Changing to Placed, Full, or others you may establish using Quick Codes. See Changing the Event Status in this Chapter.
<Assignments>	See procedure, Restricting an Event, in this chapter.
<Categories>	To group activities into three types.
<Sessions>	To create additional sessions.

Continued on next page

Scheduling an Event, Continued

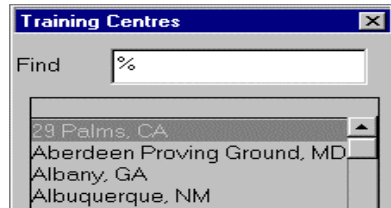

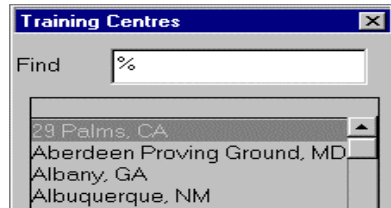

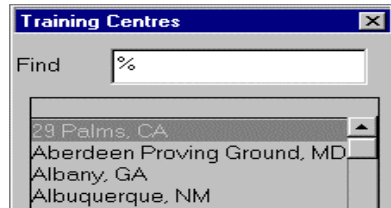

Completing the Scheduled Event Window

Step	Action						
1	Place your cursor in the Title data field and complete the following:						
	<table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td> Title   </td><td> <p>Type in a title (ALL CAPS 80 characters or less) to identify the Event; e.g., Supervisory Training 2001-1. If you leave the title field blank, you will get a system-generated number, which is difficult to use to identify the Event later when you try to query. The title you enter or the system-generated number displays in a column on the Enrollment Details Window when you reopen.</p> <p>Note: Components or local installations should determine how this title will be used. For example, you may want to include a location, start date, or component unique number; e.g., NWRegion.</p> <p>Caution: If you are trying to query on a title, be sure you have clicked F7 or enter query. Otherwise, the system will think you are establishing a new title that will result in a title that looks like %Admin%. If you realize you have not set up a query, click the clear record button  on the Toolbar and start over.</p> </td></tr> <tr> <td>Activity</td><td>Click the LOV to select the Activity. This title appears in the employee Completed Training record. Certain information such as Status and Language auto-populates from the Activity Window, but you can override it.</td></tr> </table>	Data Field	Description/Action	Title  	<p>Type in a title (ALL CAPS 80 characters or less) to identify the Event; e.g., Supervisory Training 2001-1. If you leave the title field blank, you will get a system-generated number, which is difficult to use to identify the Event later when you try to query. The title you enter or the system-generated number displays in a column on the Enrollment Details Window when you reopen.</p> <p>Note: Components or local installations should determine how this title will be used. For example, you may want to include a location, start date, or component unique number; e.g., NWRegion.</p> <p>Caution: If you are trying to query on a title, be sure you have clicked F7 or enter query. Otherwise, the system will think you are establishing a new title that will result in a title that looks like %Admin%. If you realize you have not set up a query, click the clear record button  on the Toolbar and start over.</p>	Activity	Click the LOV to select the Activity . This title appears in the employee Completed Training record. Certain information such as Status and Language auto-populates from the Activity Window, but you can override it.
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Scheduling an Event, Continued




Completing the Scheduled Event Window (continued)

Step	Action								
1 (cont)	<table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td>Center</td><td> <p>Click the LOV or type the first few letters to select the Training Center location of the Activity. <i>To be determined</i> is an LOV choice if location has not been set.</p> <p>◆ Example:</p>  </td></tr> <tr> <td>Secure Checkbox</td><td>Click if you want to limit updates to the sponsoring or administering organization.</td></tr> <tr> <td>From </td><td> <p>Type the start date. The time of day is optional.</p> <p>Note: You cannot backdate an Event.</p> </td></tr> </table>	Data Field	Description/Action	Center	<p>Click the LOV or type the first few letters to select the Training Center location of the Activity. <i>To be determined</i> is an LOV choice if location has not been set.</p> <p>◆ Example:</p> 	Secure Checkbox	Click if you want to limit updates to the sponsoring or administering organization.	From 	<p>Type the start date. The time of day is optional.</p> <p>Note: You cannot backdate an Event.</p>
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Scheduling an Event, Continued




Completing the Scheduled Event Window (continued)

Step	Action																
1 (cont)	<table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td> To  </td><td> Type the end date with the time of day in the next field. ◆ Example: Use the time format of 14:00 for 2 PM if you want to create sessions. Notes: <ul style="list-style-type: none"> • Leave start and end dates blank if you want to create an Event with the Status of “Planned”; if you do not enter dates, the Event cannot have the status of “Normal.” • Leave the time of day blank if you are not creating sessions. Also, ensure the times you enter start on (or before) and finish on (or after) the earliest and latest session times. </td></tr> <tr> <td>Resource bookings Checkbox</td><td>Select the checkbox if you have booked resources for an Event.</td></tr> <tr> <td>Duration</td><td>Type in length of unit; e.g., 40 if your units = hours. The system defaults to hours.</td></tr> <tr> <td>Units</td><td>Defaults to hours but you can override it.</td></tr> <tr> <td>Program Only Checkbox</td><td>Select to make the Event part of a program and restrict attendees.</td></tr> <tr> <td>Supplier</td><td>Select Supplier from LOV.</td></tr> <tr> <td>Sponsor</td><td>Populates from Activity.</td></tr> </table>	Data Field	Description/Action	To 	Type the end date with the time of day in the next field. ◆ Example: Use the time format of 14:00 for 2 PM if you want to create sessions. Notes: <ul style="list-style-type: none"> • Leave start and end dates blank if you want to create an Event with the Status of “Planned”; if you do not enter dates, the Event cannot have the status of “Normal.” • Leave the time of day blank if you are not creating sessions. Also, ensure the times you enter start on (or before) and finish on (or after) the earliest and latest session times.	Resource bookings Checkbox	Select the checkbox if you have booked resources for an Event .	Duration	Type in length of unit; e.g., 40 if your units = hours. The system defaults to hours.	Units	Defaults to hours but you can override it.	Program Only Checkbox	Select to make the Event part of a program and restrict attendees.	Supplier	Select Supplier from LOV.	Sponsor	Populates from Activity.
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Scheduling an Event, Continued

Completing the Scheduled Event Window (continued)

Step	Action																			
1 (cont)	<table><tr><th>Data Field</th><th>Description/Action</th></tr><tr><td><div>Status</div><div></div><div>Note: Event status controls the type of enrollments you can enter for the Event.</div></td><td>Defaults to Normal. You can use Quick Codes to add or change choices on the LOV.</td></tr><tr><td>User Status</td><td>Not used by DoD.</td></tr><tr><td>Language</td><td>Click the LOV to select a language.</td></tr><tr><td>Enrollement Start/End</td><td>Defaults to class start and end date. Override with the dates you need enrollments to start and end.</td></tr><tr><td>Restricted Checkbox</td><td>Select if you want to restrict enrollments to internal students with certain assignments, or to restrict enrollments to external students from selected customers; otherwise, leave the box unchecked to open the Event to any customer or external student.</td></tr><tr><td>Students Region:</td><td></td></tr><tr><td>Minimum/ Maximum/</td><td>Input the minimum and maximum number of students. OTA automatically sets the Event status to “Full” when the maximum is reached when you complete the Event Status Change Window. (optional)</td></tr><tr><td>Internal</td><td>Optional field. Use to limit the number who can attend from one organization on the same date.</td></tr></table>	Data Field	Description/Action	<div>Status</div> <div></div> <div>Note: Event status controls the type of enrollments you can enter for the Event.</div>	Defaults to Normal. You can use Quick Codes to add or change choices on the LOV.	User Status	Not used by DoD.	Language	Click the LOV to select a language.	Enrollement Start/End	Defaults to class start and end date. Override with the dates you need enrollments to start and end.	Restricted Checkbox	Select if you want to restrict enrollments to internal students with certain assignments, or to restrict enrollments to external students from selected customers; otherwise, leave the box unchecked to open the Event to any customer or external student.	Students Region:		Minimum/ Maximum/	Input the minimum and maximum number of students. OTA automatically sets the Event status to “Full” when the maximum is reached when you complete the Event Status Change Window. (optional)	Internal	Optional field. Use to limit the number who can attend from one organization on the same date.	
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Scheduling an Event, Continued

Completing the Scheduled Event Window (continued)

Step	Action																						
1 (cont)	<table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td>Cost Region:</td><td></td></tr> <tr> <td>Currency</td><td>Click the LOV to select currency used. You must have USD in the Currency data field in order to enter a dollar amount in the Amount data field.</td></tr> <tr> <td>Budget</td><td>Auto-populates amount from Activity Window.</td></tr> <tr> <td>Actual</td><td>Defaults to "0".</td></tr> <tr> <td>Price Region</td><td></td></tr> <tr> <td>Basis</td><td>Defaults to Student. Click the drop-down menu to make other choices.</td></tr> <tr> <td>Currency</td><td>Type in USD.</td></tr> <tr> <td>Amount</td><td></td></tr> <tr> <td>Invoiced</td><td>Leave blank; field protected against update.</td></tr> <tr> <td>DDF</td><td>Click to open the Additional Event Information Window.</td></tr> </table>	Data Field	Description/Action	Cost Region:		Currency	Click the LOV to select currency used. You must have USD in the Currency data field in order to enter a dollar amount in the Amount data field.	Budget	Auto-populates amount from Activity Window.	Actual	Defaults to "0".	Price Region		Basis	Defaults to Student. Click the drop-down menu to make other choices.	Currency	Type in USD.	Amount		Invoiced	Leave blank; field protected against update.	DDF	Click to open the Additional Event Information Window.
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Amount																							
Invoiced	Leave blank; field protected against update.																						
DDF	Click to open the Additional Event Information Window.																						
2	Additional Event Information Window displays. See steps to complete in the next procedure.																						

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Scheduling an Event, Continued

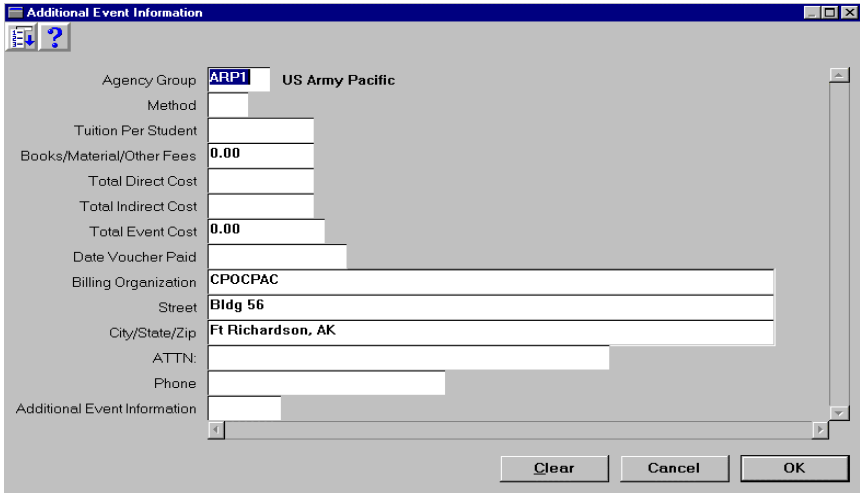

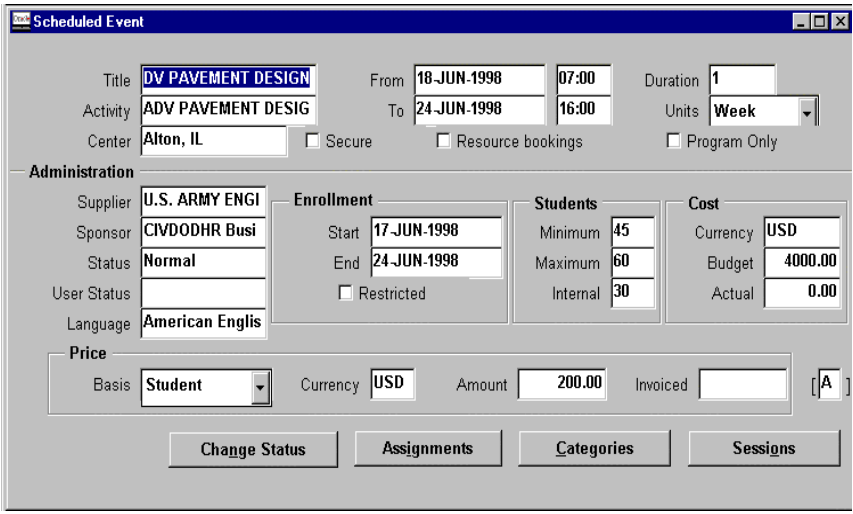
Completing the Additional Event Information Window

Step	Action																														
1	<p>With your cursor in the first field, complete the following:</p> <table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td>Agency Group</td><td>Click the LOV (required field).</td></tr> <tr> <td>Method</td><td>Click the LOV (required field).</td></tr> <tr> <td>Tuition Per Student</td><td>Type in the dollar amount. This may be a different amount depending on the student.</td></tr> <tr> <td>Books/Material/Other Fees</td><td>Type in cost, if known.</td></tr> <tr> <td>Total Direct Cost</td><td>System totals sum of Tuition Per Student and Book/Material/Other fees from previous data fields.</td></tr> <tr> <td>Total Indirect Cost</td><td>Enter total indirect cost.</td></tr> <tr> <td>Total Event Cost</td><td>Leave blank. Once you save the DDF and open again, the total displays.</td></tr> <tr> <td>Date Voucher Paid</td><td>Leave blank – data field to be moved to another window.</td></tr> <tr> <td>Billing Organization</td><td>Type in name of organization that will pay invoice, to include email if needed.</td></tr> <tr> <td>Street</td><td>Type in street address of billing organization.</td></tr> <tr> <td>City/State/Zip</td><td>Type in the city, state, and zip code.</td></tr> <tr> <td>ATTN:</td><td>Type in name of person in billing organization.</td></tr> <tr> <td>Phone</td><td>Type in phone number of billing organization.</td></tr> <tr> <td>Additional Event Information</td><td>Click LOV. (WHS/AFTMS use only)</td></tr> </table>	Data Field	Description/Action	Agency Group	Click the LOV (required field).	Method	Click the LOV (required field).	Tuition Per Student	Type in the dollar amount. This may be a different amount depending on the student.	Books/Material/Other Fees	Type in cost, if known.	Total Direct Cost	System totals sum of Tuition Per Student and Book/Material/Other fees from previous data fields.	Total Indirect Cost	Enter total indirect cost.	Total Event Cost	Leave blank. Once you save the DDF and open again, the total displays.	Date Voucher Paid	Leave blank – data field to be moved to another window.	Billing Organization	Type in name of organization that will pay invoice, to include email if needed.	Street	Type in street address of billing organization.	City/State/Zip	Type in the city, state, and zip code.	ATTN:	Type in name of person in billing organization.	Phone	Type in phone number of billing organization.	Additional Event Information	Click LOV. (WHS/AFTMS use only)
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Scheduling an Event, Continued

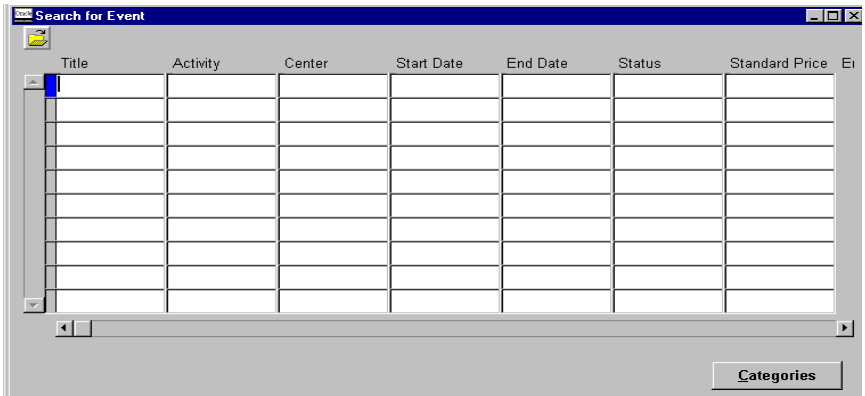
Completing the Additional Event Information Window (continued)

Step	Action
2	<p>Click <OK> and click Save. ◆ Example:</p> 
3	<p>The Scheduled Event Window displays with the data populated. Click Save  on the Toolbar. ◆ Example:</p> 

Querying for an Event

Querying for an Event

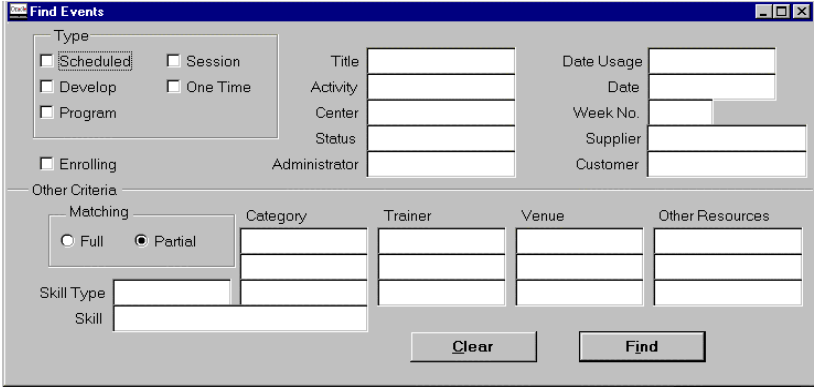
In addition to the Querying methods you learned in the Fundamentals Module, OTA has a unique querying feature with the **Find Events** Window that allows you to specify the Type of Event by Activity, Center, or Status. Use the following steps to query for an Event.

Step	Action
1	On the Navigation List → <i>Events</i> → <i>Events Search</i> → <Open> .
2	<p>The Search for Event Window displays. Query for the Event by clicking F7/F8 and using the <i>Current Record Indicator</i> to find the Event you want.</p> <p>Or</p> <p>Click F7, place the cursor in the Title or Activity block, type a portion of the name (e.g., %Man%) and click F8.</p> 

Continued on next page



Querying for an Event, Continued

Querying for an Event (continued)

Step	Action
2 (cont)	<p><i>Or</i></p> <p>On the Search for Event Window, click Query on the Main Menu Bar and click Find. The Find Events Window displays. Select the appropriate checkboxes or use the LOVs to customize the search for the Event you need.</p> 
3	Click <Find> . The Search for Event Window displays with the selected Event(s) populated.
4	Select the Event you need and continue your action.

Copying an Event

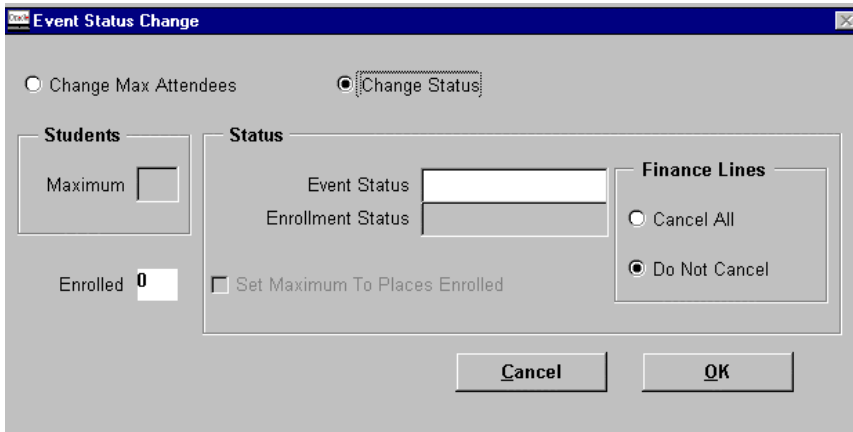
Copying an Event

Step	Action																				
1	With the Scheduled Event Window open you need to copy, click the New Record button on the toolbar  .																				
2	<p>A new Scheduled Event Window displays.</p> <p>With your cursor on each data field you want to duplicate from the previous Event, click the F3 key at the top of your keyboard.</p> <p> Note: New data must be entered in the DDF, as it will not copy.</p> <table border="1"> <thead> <tr> <th>Data Field</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>Title</td><td>Will be blank; type in a unique title that you will be able to identify later.</td></tr> <tr> <td>Activity</td><td>Press F3 on the keyboard to populate.</td></tr> <tr> <td>Center</td><td>Press F3 to populate.</td></tr> <tr> <td>From and To</td><td>If you do not plan to use the dates from the original Event, input new dates and hours.</td></tr> <tr> <td>Duration</td><td>Click F3 to populate.</td></tr> <tr> <td>Units</td><td>Defaults to day when you press F3; you can override.</td></tr> <tr> <td>Status</td><td>Defaults to Normal as you are creating a new record.</td></tr> <tr> <td>Enrollment Region</td><td>Defaults to today's date; type in the dates needed.</td></tr> <tr> <td>Price Region</td><td>Defaults to Student; select from the drop-down menu.</td></tr> </tbody> </table>	Data Field	Description/Action	Title	Will be blank; type in a unique title that you will be able to identify later.	Activity	Press F3 on the keyboard to populate.	Center	Press F3 to populate.	From and To	If you do not plan to use the dates from the original Event, input new dates and hours.	Duration	Click F3 to populate.	Units	Defaults to day when you press F3; you can override.	Status	Defaults to Normal as you are creating a new record.	Enrollment Region	Defaults to today's date; type in the dates needed.	Price Region	Defaults to Student; select from the drop-down menu.
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Price Region	Defaults to Student; select from the drop-down menu.																				
3	Click Save on the Toolbar once you have completed all fields and proceed with your action on the Event.																				

Changing the Event Status

Changing the Event Status


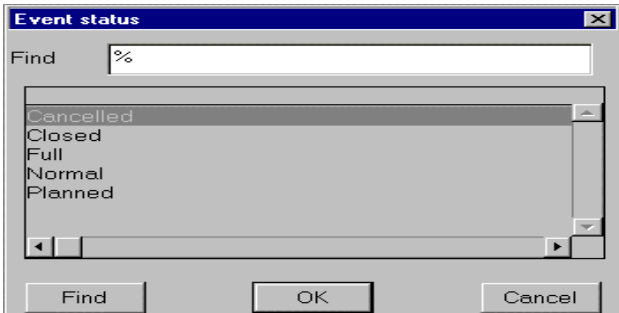
Once you have scheduled an **Event**, you might need to make changes at a later time. The types of changes might include maximum number of students or status of the **Event**. Changing Max Attendees is discussed in Chapter 3.

Step	Action
1	Click < Change Status > on the Scheduled Event Window .
2	<p>The Event Status Change Window displays.</p>  <p>There are two buttons at the top of the window.</p> <ul style="list-style-type: none"> • Change Max Attendees • Change Status <ul style="list-style-type: none"> • The Students Region has a Maximum field, which can be changed by increasing or decreasing the number. • The Status Region has the Event Status data field and the Enrollment Status data field with a checkbox for Set Maximum to Places Enrolled. If the Event is Full, you can prevent any new enrollments by changing the Event status to “Closed.” This automatically cancels any enrollments with the status “Requested” as those enrollments have not been confirmed or approved. <p>The Finance Lines Region is not currently used by DoD.</p>

Continued on next page

Changing the Event Status, Continued



Changing the Event Status (continued)

Step	Action								
3	<p>Select the Change Status radio button.</p> <p> Notes: If the Secure checkbox is selected on the Scheduled Event Window, you can update the Event if you are assigned to the organization that is administering the Event.</p>								
	<p>If the Event Status is:</p> <table border="1"> <tr> <td>Planned</td><td>All enrollments must be Requested, Waitlisted, or cancelled.</td></tr> <tr> <td>Full</td><td>You can only enter new Requested or Waitlisted enrollments.</td></tr> <tr> <td>Closed</td><td>If you close it, or the enrollment period elapses, you cannot enter new student enrollments.</td></tr> <tr> <td>Cancelled</td><td>All enrollments change automatically to status Cancelled, and you cannot enter any new enrollments.</td></tr> </table>	Planned	All enrollments must be Requested, Waitlisted, or cancelled.	Full	You can only enter new Requested or Waitlisted enrollments.	Closed	If you close it, or the enrollment period elapses, you cannot enter new student enrollments.	Cancelled	All enrollments change automatically to status Cancelled, and you cannot enter any new enrollments.
Planned	All enrollments must be Requested, Waitlisted, or cancelled.								
Full	You can only enter new Requested or Waitlisted enrollments.								
Closed	If you close it, or the enrollment period elapses, you cannot enter new student enrollments.								
Cancelled	All enrollments change automatically to status Cancelled, and you cannot enter any new enrollments.								
4	<p>With the cursor in the <i>Event Status</i> data field, click the LOV.</p> 								
5	Click "Cancelled" and click <OK> .								

Continued on next page

Changing the Event Status, Continued

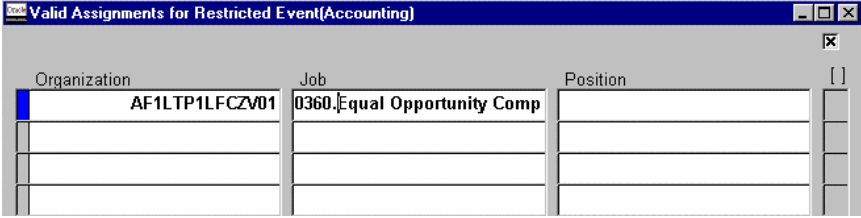

Changing the Event Status (continued)

Step	Action
6	The Enrollment Status data field now opens, with your cursor in it, click the LOV.
7	<p>Click “Cancelled.” Click <OK>. A Caution Box displays and states “All Enrollments will be Cancelled.”</p> <p>Click <OK>.</p> <p> Note: When you select “Cancelled” or “Planned” from the Event Status LOV, the Enrollment Status data field on the Event Status Change Window opens, with other choices.</p>
8	<p>To check the changes you made, re-query the Event and check the Status data field to see if the new status is reflected.</p> <p> Note: “Waitlisted” can be added to the LOV. See Chapter 7, Setting Up Local Codes for additional information.</p>

Restricting an Event

Restricting an Event

You can Restrict an Event to a specific organization, job title, or position, on the **Scheduled Event** Window.

Step	Action
1	On the Scheduled Event Window, select the <i>Restricted</i> checkbox (under the Enrollment Region) and click <Assignments> .
2	<p>The Valid Assignments for Restricted Event Window displays with the Event in parenthesis on the window title. Click the LOV to populate <i>Organization</i> and <i>Job</i> columns. Click Save on the Toolbar.</p> <p>◆ Example:</p> 
3	Exit the window.
	Note: Future enrollments will allow you to enroll only those personnel you specified by Organization and Job series/title.

Creating a One-Time Event

Purpose

This procedure guides you through the steps to Create a One-Time Event when it is more appropriate than creating a Scheduled Event.



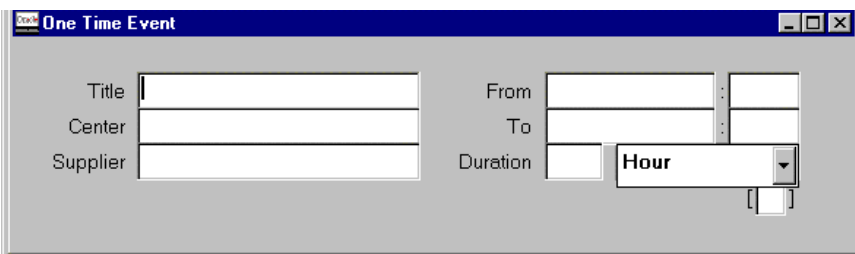
Note: You must run the *Submit One Time Event Update HR* report before you begin this process in order for the information to flow to Oracle HR. See Chapter 6, Reports, for details.

Before You Begin

- You can Create a One-Time Event for Events that are normally less than eight hours, do not require an Evaluation, and are mandated to be recorded in the employee's record. Examples would be training on Ethics, HIV, or computer security, which usually involves scheduling the entire workforce. **One-Time Events are based on a 24-hour clock.**
- The **One Time Event** Window is designed for rapid entry of minimum event information to support student enrollments. It does not support the full features of the **Scheduled Events** Window.
- Once you create a One Time Event, you cannot change it. You can query for it on the **Search for Event** Window or enroll students in the **Enrollment Details** Window.

Creating a One-Time Event

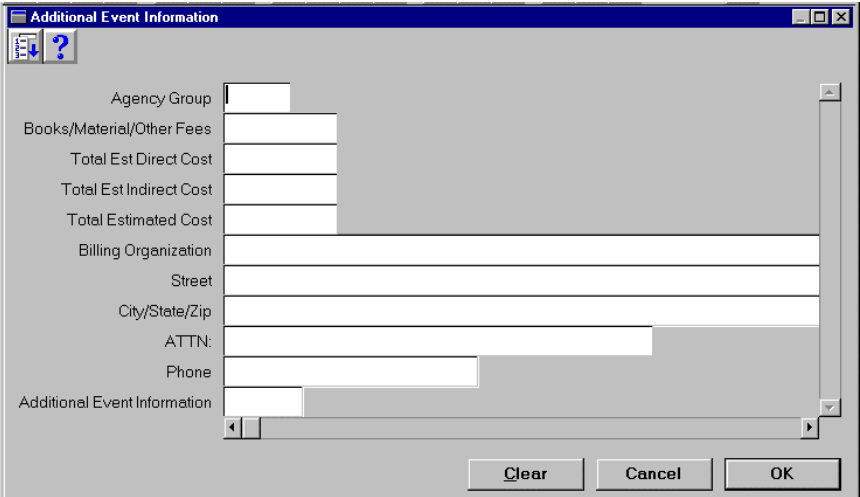
Follow the steps below to create a One-Time Event. Use the same procedure in Chapter 3, Enrolling an Employee, once your event is built.

Step	Action
1	On the Navigation List → <i>Events</i> → <i>One-Time</i> → <Open> .
2	<p>The One Time Event Window displays. With your cursor in the Title, complete the following data fields:</p> 

Continued on next page

Creating a One-Time Event, Continued

Creating a One-Time Event (continued)

Step	Action	
2 (cont)	Data Field	Description/Action
	Title	Type in the Event title.
	Center	Click the LOV to make the selection.
	Supplier	Click the LOV to make the selection.
	From	Click the LOV to use the calendar. If a specific hour is used, it must be a 5-digit entry; i.e. 08:00 based on a 24-hour clock.
	To	Click the LOV to use the calendar. If a specific hour is used, it must be a 5-digit entry.
	Duration	Type in the number.
	Hour	Click on the drop-down menu to select hours, days, week, etc.
	DDF	Click the DDF to open the Additional Event Information Window.
3	<p>The Additional Event Information Window and its data fields are described in the procedure on Scheduling an Event in this chapter. Complete the window and click <OK>. Agency is a required data field.</p> 	
4	Save your action.	

Continued on next page

Using the Bulletin Board

Purpose

This procedure guides you through the steps to initiate surveys, advertise training events, and post instructions for students on the Bulletin Board.

See Also



In this Module:

Overview

Chapter 1, Requesting Training

Section: Completing the Training Request Form

Chapter 3, Managing Enrollments, Cancellations, and Attendance

Section: Enrolling an Employee

Who Has Access



Components will determine who will be given access to the Bulletin Board to post Events and surveys.

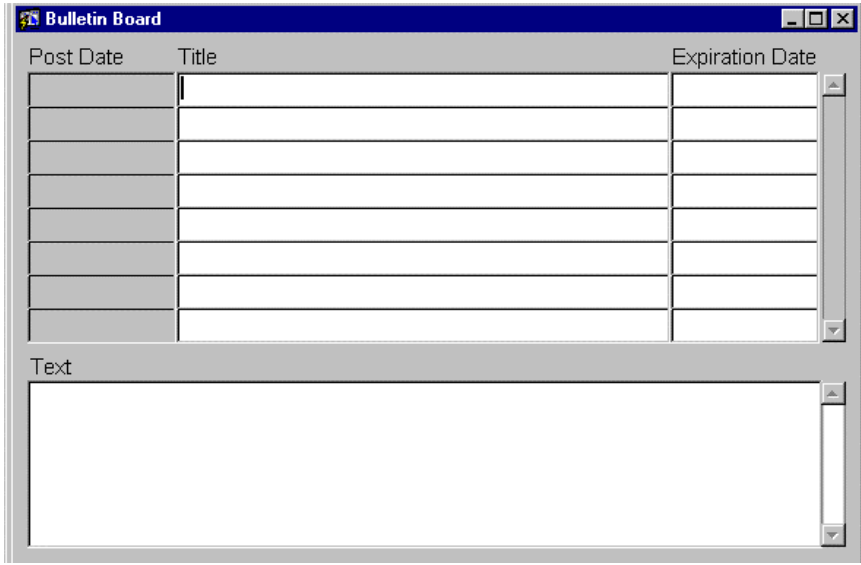
Before You Begin

- The Bulletin Board will be the primary means of announcing annual and special surveys, advertising events for all or selected personnel, announcing event changes and cancellations, and to provide special reporting instructions for students.
- To view the Bulletin Board announcements, click F7/F8. If there are a large number of entries, you can query either in the Title data field or the Text field.
- All personnel may be assigned access to **view** the Bulletin Board.

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Using the Bulletin Board, Continued



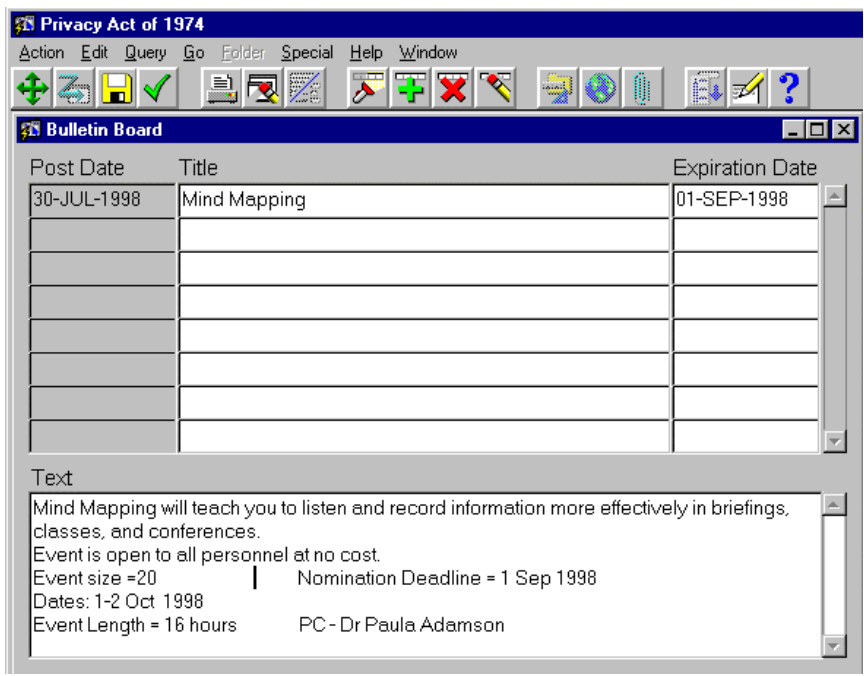
Using the Bulletin Board

Step	Action										
1	On the Navigation List → <i>Bulletin Board</i> → <Open> .										
2	<p>The Bulletin Board Window displays with three columns and a Text Box. Click F7/F8 to display current posted items. Complete the following data fields to post a new item.</p> 										
	<table border="1"> <thead> <tr> <th>Data Fields</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>Post Date</td><td>Date the message was posted to the Bulletin Board.</td></tr> <tr> <td>Title</td><td>The subject assigned to a message.</td></tr> <tr> <td>Expiration Date</td><td>Date the message will be removed.</td></tr> <tr> <td>Text Box</td><td>Provides spaces for additional information such as course description, length, size, dates, point of contact, or nomination deadline with 2000 characters available.</td></tr> </tbody> </table>	Data Fields	Description/Action	Post Date	Date the message was posted to the Bulletin Board.	Title	The subject assigned to a message.	Expiration Date	Date the message will be removed.	Text Box	Provides spaces for additional information such as course description, length, size, dates, point of contact, or nomination deadline with 2000 characters available.
Data Fields	Description/Action										
Post Date	Date the message was posted to the Bulletin Board.										
Title	The subject assigned to a message.										
Expiration Date	Date the message will be removed.										
Text Box	Provides spaces for additional information such as course description, length, size, dates, point of contact, or nomination deadline with 2000 characters available.										

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Using the Bulletin Board, Continued

Using the Bulletin Board (continued)

Step	Action
3	With your cursor in the Title data field, type the title of your course or message.
4	With your cursor in the Expiration Date data field, click the LOV and select a date. Click <OK>. The date populates the field.
5	With your cursor in the Text box , type your message.  Note: You can input up to 2000 characters.
6	Click Save  on the Toolbar. The Post Date populates with today's date. ◆ Example: 
7	Exit the window.

Building and Booking Resources

Purpose

This procedure guides you through the steps to build and book resources for trainers, venues (locations), and other resources. Resources are any facilities, people, or equipment you need to book to run an Event.

See Also

In this module:

Chapter 2, Creating a Local Supplier

Chapter 2, Defining a Local Activity

Chapter 7, Setting up Local Codes

Who Has Access

You must be in the role of OTA Training Administrator.

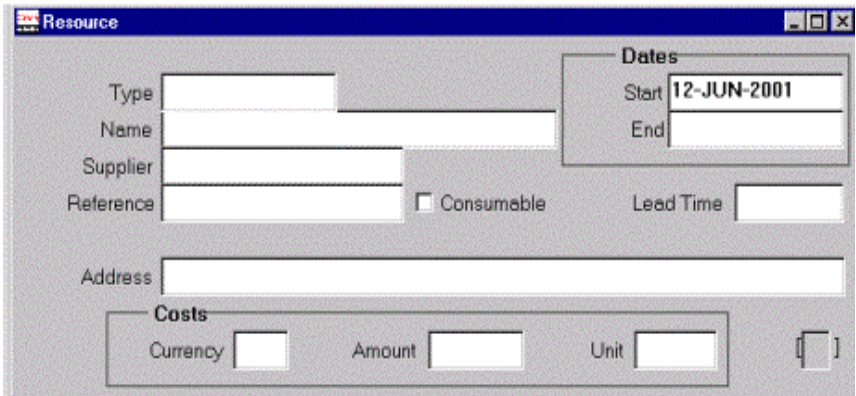
Before You Begin

- You need to set up resources before you can associate them with activities and book them for events.
 - You can define generic resource types, such as overhead projector or networked PCs. You define these as QuickCode values under Resource Type.
 - You can also define specific resources available from a particular Supplier. For example, you could record the Grove International Hotel (Supplier) as one venue holding 500 people and four venues holding 100 people.
-

Continued on next page

Building and Booking Resources, Continued

Building a Trainer Resource

Step	Action														
1	On the Navigation List → <i>Resources</i> → <i>Definitions</i> → <Open> .														
2	<p>The Resource Window displays. Complete the following data elements:</p> 														
	<table> <tr> <th>Data Fields</th><th>Description/Action</th></tr> <tr> <td>Type</td><td>Click the LOV and select Trainer.</td></tr> <tr> <td>Name</td><td>Query for last name, then select from the list. If not currently on the database, use the Building External Students process to add a name.</td></tr> <tr> <td>Supplier</td><td>Click the LOV and select from the list (Vendors) to include local suppliers you have built.</td></tr> <tr> <td>Reference</td><td>Free-form text (80 characters).</td></tr> <tr> <td>Lead Time</td><td>Enter the number of days you must schedule or book the Trainer in advance.</td></tr> <tr> <td>Consumable Checkbox</td><td>Click if the resource is consumed when used, and is not reusable. For example, markers and flip chart paper are normally consumable, whereas computers and venues are reusable.</td></tr> </table>	Data Fields	Description/Action	Type	Click the LOV and select Trainer.	Name	Query for last name, then select from the list. If not currently on the database, use the Building External Students process to add a name.	Supplier	Click the LOV and select from the list (Vendors) to include local suppliers you have built.	Reference	Free-form text (80 characters).	Lead Time	Enter the number of days you must schedule or book the Trainer in advance.	Consumable Checkbox	Click if the resource is consumed when used, and is not reusable. For example, markers and flip chart paper are normally consumable, whereas computers and venues are reusable.
Data Fields	Description/Action														
Type	Click the LOV and select Trainer.														
Name	Query for last name, then select from the list. If not currently on the database, use the Building External Students process to add a name.														
Supplier	Click the LOV and select from the list (Vendors) to include local suppliers you have built.														
Reference	Free-form text (80 characters).														
Lead Time	Enter the number of days you must schedule or book the Trainer in advance.														
Consumable Checkbox	Click if the resource is consumed when used, and is not reusable. For example, markers and flip chart paper are normally consumable, whereas computers and venues are reusable.														

Continued on next page

Building and Booking Resources, Continued

Building a Trainer Resource (continued)

Step	Action	
2 (cont)	Dates Region:	Start date auto-populates with today's date but can be overridden with date resource is available. Enter End Date.
	Address	Type the address for the Trainer.
	Costs Region:	
	Currency	When you click the LOV, it defaults to USD.
	Amount	Type the cost per unit.
	Unit	Click the LOV and select day, hour, month, or year.
	DDF	Grayed out.
3	Save your action.	

Example of Trainer Resource Window

The screenshot shows a 'Resource' window with the following details:

- Type:** Trainer
- Name:** York, Tricia C
- Supplier:** USDA GRADUATE SCH
- Reference:** (empty field)
- Consumable:** ☐
- Lead Time:** 60
- Address:** Southeast Region, Atlanta, GA 88888
- Dates:** Start: 12-JUN-2001, End: 15-JUN-2001
- Costs:**
 - Currency:** USD
 - Amount:** 2000.00
 - Unit:** Day

Continued on next page

Building and Booking Resources, Continued

Building a Venue Resource

Step	Action																												
1	On the Navigation List → <i>Resources</i> → <i>Definitions</i> → <Open> .																												
2	The Resource Window displays. Complete the following data elements:																												
	<table> <tr> <th>Data Fields</th><th>Description/Action</th></tr> <tr> <td>Type</td><td>Click the LOV and select Venue.</td></tr> <tr> <td>Name (of venue)</td><td>Two data elements display. Query for last name, then select from the list for the Center.</td></tr> <tr> <td>Supplier</td><td>Click the LOV and select from the list (Vendors) to include local suppliers you have built.</td></tr> <tr> <td>Reference</td><td>Free-form text (80 characters).</td></tr> <tr> <td>Lead Time</td><td>Enter the number of days you must schedule or book the Venue in advance.</td></tr> <tr> <td>Consumable Checkbox</td><td>Click if the resource is consumed when used, and is not reusable. For example, pens and paper are normally consumable, whereas computers and venues are reusable.</td></tr> <tr> <td>Dates Region:</td><td>Start date auto-populates with today's date but can be overridden when venue is available. Enter End Date.</td></tr> <tr> <td>Address</td><td>Type in address of the venue.</td></tr> <tr> <td>Costs Region:</td><td></td></tr> <tr> <td>Currency</td><td>When you click the LOV, it defaults to USD.</td></tr> <tr> <td>Amount</td><td>Type the cost per unit.</td></tr> <tr> <td>Unit</td><td>Click the LOV and select day, hour, month, or year.</td></tr> <tr> <td>DDF</td><td>Grayed out.</td></tr> </table>	Data Fields	Description/Action	Type	Click the LOV and select Venue.	Name (of venue)	Two data elements display. Query for last name, then select from the list for the Center.	Supplier	Click the LOV and select from the list (Vendors) to include local suppliers you have built.	Reference	Free-form text (80 characters).	Lead Time	Enter the number of days you must schedule or book the Venue in advance.	Consumable Checkbox	Click if the resource is consumed when used, and is not reusable. For example, pens and paper are normally consumable, whereas computers and venues are reusable.	Dates Region:	Start date auto-populates with today's date but can be overridden when venue is available. Enter End Date.	Address	Type in address of the venue.	Costs Region:		Currency	When you click the LOV, it defaults to USD.	Amount	Type the cost per unit.	Unit	Click the LOV and select day, hour, month, or year.	DDF	Grayed out.
Data Fields	Description/Action																												
Type	Click the LOV and select Venue.																												
Name (of venue)	Two data elements display. Query for last name, then select from the list for the Center.																												
Supplier	Click the LOV and select from the list (Vendors) to include local suppliers you have built.																												
Reference	Free-form text (80 characters).																												
Lead Time	Enter the number of days you must schedule or book the Venue in advance.																												
Consumable Checkbox	Click if the resource is consumed when used, and is not reusable. For example, pens and paper are normally consumable, whereas computers and venues are reusable.																												
Dates Region:	Start date auto-populates with today's date but can be overridden when venue is available. Enter End Date.																												
Address	Type in address of the venue.																												
Costs Region:																													
Currency	When you click the LOV, it defaults to USD.																												
Amount	Type the cost per unit.																												
Unit	Click the LOV and select day, hour, month, or year.																												
DDF	Grayed out.																												
3	Click Save.																												

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Building and Booking Resources, Continued

Building a Venue Resource (continued)

Example of Completed Venue Window

The screenshot shows the 'Resource' window with the following fields filled out:

- Type: Venue
- Name: Navy, Norfolk, VA
- Supplier: Fred Sherman Inc
- Reference: Room 2
- Consumable: ☐
- Lead Time: 30
- Address: 425 Water Street Portsmouth, VA 23704-3801
- Costs:
 - Currency: USD
 - Amount: 1200.00
 - Unit: Week
- Dates:
 - Start: 12-JUN-2001
 - End: 15-JUN-2001

Booking the Resource

This can be accomplished two ways, either through the **Activities** Window or through the **Search for Event** Window. Method #1:

Step	Action
1	On the Navigation List → <i>Activities</i> → <Open> .
2	The Activities Window displays. When you build a Local Activity, click <Resources> to select the venue or trainer needed.

The screenshot shows the 'Activities' window with the following fields filled out:

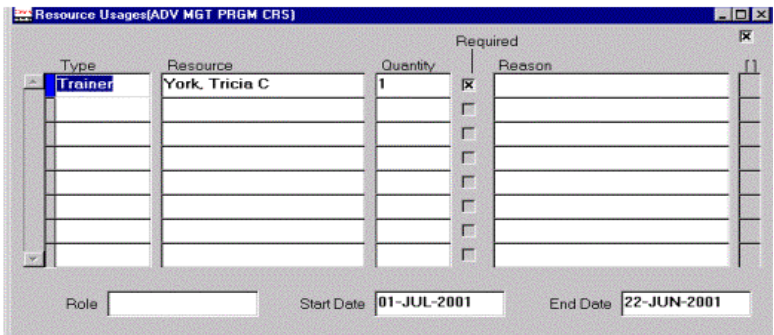
- Activity Type: 1-A EXECUTIVE
- Description: 1-A EXECUTIVE
- Concurrent Activities: ☒
- Activity Name: Adv Management Prog
- Description: Refines skills, knowledge, and understanding essential to
- Audience: Two years in the grade of colonel before class entry. For
- Objectives: Two years in the grade of colonel before class entry. For
- Supplier: AIR UNIV CENTER FOR PROF DE
- Language: American English
- Next Activity:
- Valid Dates:
 - From: 01-JAN-1950
 - To:
- Sponsor Org: CIVDODHR
- Managed by: Bailey, Patrick H
- Status:
- Success Criteria: ☒ Allow Expenses
- Students:
 - Maximum: 60
 - Minimum: 45
 - Max Internal: 30
- Costs:
 - Currency: USD
 - Budget: 0.00
 - Actual: 0.00
- Duration:
 - Length: 40
 - Units: Hour
- Professional Credits:
 - Type:
 - Amount:

Buttons at the bottom: Skills, Categories, Resources, Copy Objects

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Building and Booking Resources, Continued

Booking the Resource (continued)

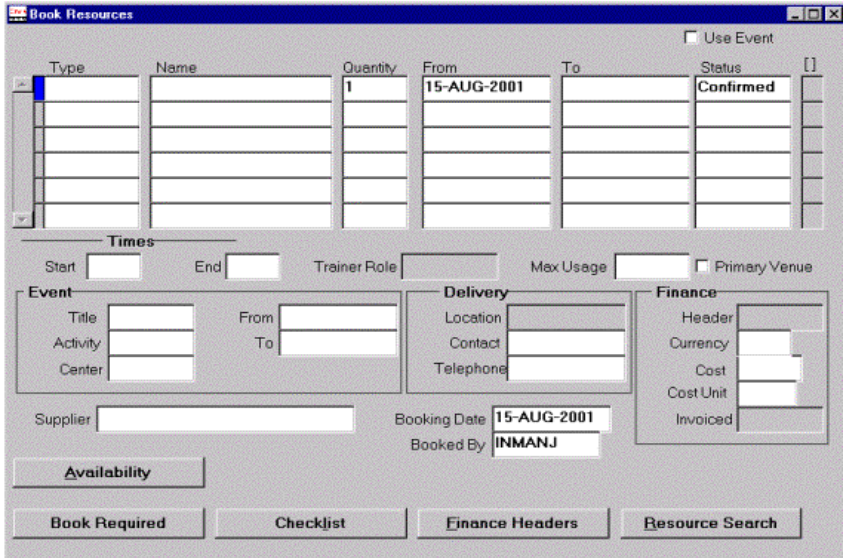
Step	Action																				
3	<p>The Resource Usages Window displays. Complete the following data fields.</p> 																				
	<table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td>Type</td><td>Click the LOV and select Trainer, Venue, or other Resource type you have built.</td></tr> <tr> <td>Resource</td><td>If you clicked Trainer, select from the list of names you built.</td></tr> <tr> <td>Quantity</td><td>Type in number needed; such as number of PCs if you selected other Resource type.</td></tr> <tr> <td>Required checkbox</td><td>Select if required.</td></tr> <tr> <td>Reason</td><td>Click the LOV and select from the reasons you built in RESOURCE_USAGE.</td></tr> <tr> <td>DDF</td><td>Not used by DoD.</td></tr> <tr> <td>Role</td><td>Click the LOV and select from the roles you built in TRAINER_PARTICIPATION.</td></tr> <tr> <td>Start Date</td><td>Override the start date and use one within the availability of the resource when you built it.</td></tr> <tr> <td>End Date</td><td>Click the LOV to select a date within the resource availability.</td></tr> </table>	Data Field	Description/Action	Type	Click the LOV and select Trainer, Venue, or other Resource type you have built.	Resource	If you clicked Trainer, select from the list of names you built.	Quantity	Type in number needed; such as number of PCs if you selected other Resource type.	Required checkbox	Select if required.	Reason	Click the LOV and select from the reasons you built in RESOURCE_USAGE.	DDF	Not used by DoD.	Role	Click the LOV and select from the roles you built in TRAINER_PARTICIPATION.	Start Date	Override the start date and use one within the availability of the resource when you built it.	End Date	Click the LOV to select a date within the resource availability.
Data Field	Description/Action																				
Type	Click the LOV and select Trainer, Venue, or other Resource type you have built.																				
Resource	If you clicked Trainer, select from the list of names you built.																				
Quantity	Type in number needed; such as number of PCs if you selected other Resource type.																				
Required checkbox	Select if required.																				
Reason	Click the LOV and select from the reasons you built in RESOURCE_USAGE.																				
DDF	Not used by DoD.																				
Role	Click the LOV and select from the roles you built in TRAINER_PARTICIPATION.																				
Start Date	Override the start date and use one within the availability of the resource when you built it.																				
End Date	Click the LOV to select a date within the resource availability.																				
4	Save your action.																				

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Building and Booking Resources, Continued

Booking the Resource

Method #2:

Step	Action												
1	On the Navigation List → <i>Event Search</i> → <Open> .												
2	The Search for Event Window displays. Query for the Event you need to book resources against, and then close the window.												
3	<p>The Book Resources Window displays with Resources Booked and Finance Headers Windows cascaded behind it. Complete the following data fields:</p>  <table border="1"> <thead> <tr> <th>Data Field</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>Type</td><td>Click the LOV to select Trainer, Venue, etc.</td></tr> <tr> <td>Name</td><td>Click the LOV to select.</td></tr> <tr> <td>Quantity</td><td>Defaults to 1 but can be overridden.</td></tr> <tr> <td>From</td><td>Auto-populates.</td></tr> <tr> <td>To</td><td>Input date</td></tr> </tbody> </table>	Data Field	Description/Action	Type	Click the LOV to select Trainer, Venue, etc.	Name	Click the LOV to select.	Quantity	Defaults to 1 but can be overridden.	From	Auto-populates.	To	Input date
Data Field	Description/Action												
Type	Click the LOV to select Trainer, Venue, etc.												
Name	Click the LOV to select.												
Quantity	Defaults to 1 but can be overridden.												
From	Auto-populates.												
To	Input date												

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Building and Booking Resources, Continued

Booking the Resource (continued)

Step	Action	
3 (cont)	Data Field	Description/Action
	Status	Defaults to Confirmed but can be overridden with Planned.
	Start	Enter time of day. (08:00)
	End	Enter time of day.
	Trainer Role	Defaults to Facilitator.
	Max Usage	Free flow 11 characters.
	Event Region:	Not used.
	Delivery Region:	Freeflow text.
	Finance Region:	Not used.
	Supplier	Auto-populates when <Availability> clicked and trainer selected.
	Booking Date	Auto-populates with today's date.
	Booked By	Auto-populates with name of user.
4	Save your action.	